



Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Required Report - public distribution

Date: 11/16/2001

GAIN Report #HK1068

Hong Kong

Retail Food Sector

Report

2001

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Report Highlights:

Total retail sales of food and drinks in Hong Kong for 2000 reached US\$6.303 billion, rising 3% from US\$6.097 billion in 1999. For January - August 2001, retail sales of food, alcoholic drinks, and tobacco (excluding sales in supermarkets) increased 3.4%, while that for supermarkets 1.9 %, compared with the same period last year. The market offers great potential to various U.S. products as identified in the report.

Includes PSD changes: No
Includes Trade Matrix: No
Annual Report
Hong Kong [HK1], HK

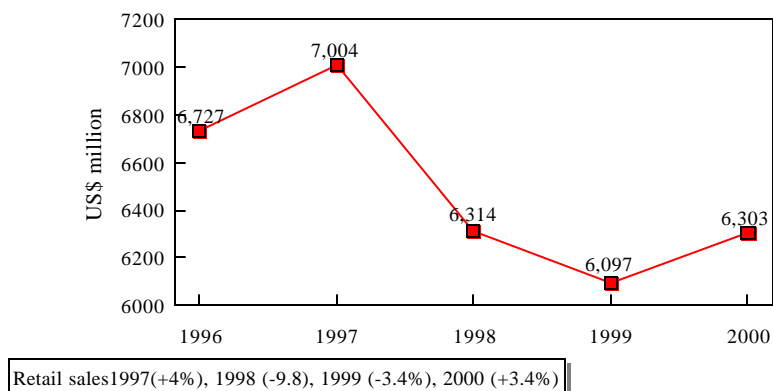
Table of Contents

I. Market Summary	1
II. Road Map for Market Entry	5
A. Supermarkets	5
B. Convenience Stores	8
C. Traditional Markets	9
III. Competition	10
IV. Best Product Prospects	12
V. Post Contact and Further Information	13

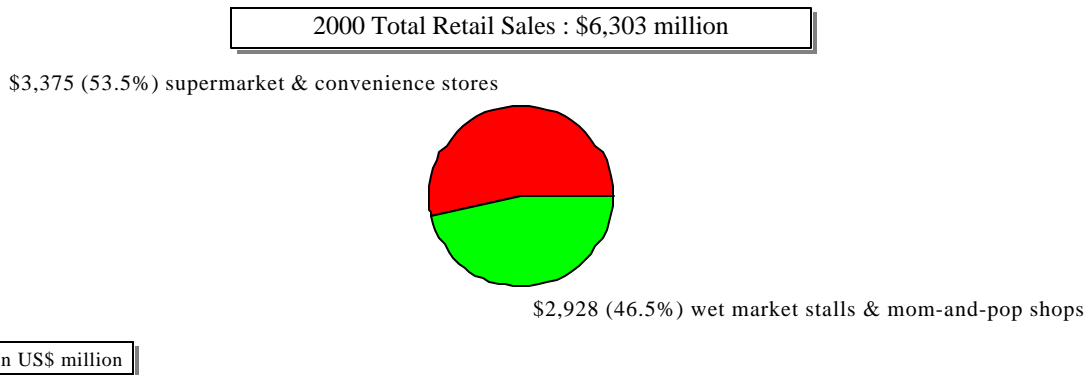
I. Market Summary

- Hong Kong has a population of 6.8 million with an annual growth rate of 1.5%. Its per capita GDP stands at \$24,137. The government's forecast of 2001 GDP is 1%.
- Total retail sales of food and drinks in Hong Kong for 2000 reached US\$6.303 billion, rising 3% from US\$6.097 billion in 1999. For January - August 2001, retail sales of food, alcoholic drinks, and tobacco (excluding sales in supermarkets) increased 3.4%, while that for supermarkets 1.9 %, compared with the same period last year.

Retail Sales in the Past 5 Years



- Retail establishments in 1999 amounted to 15,855, which included (1) 99 supermarkets and convenience stores establishments (including retail outlet branches, estimated at about 740) and (2) 15,756 wet market stalls and “mom and pop” shop operators. Retail shops in Hong Kong generally are very small in size, about 98% of which hire less than 10 employees.
- Different retail outlets have their own features. Wet markets are still very strong in “fresh food” retail such as meat, seafood, fruit and vegetables. “Mom-and-pop” shops sell conventional snacks and drink products. Convenience stores are characterized by a round-the-clock operation. Food products available include mainly snacks and beverages. In the past, Hong Kong supermarkets sold mainly canned food, snacks, biscuits (cookies and crackers), and beverages. In recent years, meat and produce also have become available in supermarkets. It seems that supermarkets are consciously planning to expand their fresh meat and produce sections in order to capture additional market share from traditional wet markets. There are 13 department stores in Hong Kong that have supermarkets in them. Most of these are Japanese department stores and they tend to carry novelty products, particularly those from Japan.
- Although the supermarket category constitutes a very tiny number of Hong Kong's total retail outlets, its share in terms of retail sales is significant : 44% of total sales in 1995, 45% in 1996, 44 % in 1997 and 54 % in 1998, 1999 and 2000. The significant jump since 1998 may indicate that supermarkets have taken much business away from traditional wet markets.



- Some significant supermarket highlights in 2001 included the collapse of adMart and Guangnan (KK). Following the closure of Carrefour and Market Republic in the earlier part of 2000, adMart, a forerunner in on-line food retailing in Hong Kong, announced its closure on December 2000 after only a year and a half of operation. A company representative claimed that Hong Kong is not yet ready for full-fledged internet retail business and that its home delivery cost was too expensive. He said these were the two main reasons leading to adMart's failure.
- Guangnan (KK) became the latest in a string of competitors to fall. Guangnan had a total of 34 chain stores which were closed in June 2001 without giving any prior notice. Poor management was one of the reasons leading to Guangnan's failure. However, mid-sized supermarkets like KK were in a particularly difficult position because they can neither compete with the giants in resources and price, nor with small grocery stores in fresh ideas and convenience. In August, Wellcome announced that it bought 8 of Guangnan's stores.
- Retail market continues to be dominated by two major supermarket chains, ParknShop (200 outlets) and Wellcome (252 outlets). This year a "shopping mall" concept has emerged in the operation of some new superstores, i.e., a variety of services are provided. For example, a newly opened Wellcome, with a floor area of 54,000 square feet, provides massage service. A doctor specializing in Chinese medicine has an office within the store providing consultation to patients. The largest ParknShop store in Hong Kong has a floor area of 75,000 square feet and sells over 20,000 product categories ranging from snacks to electrical household appliances. New features include a drug store operating inside the superstore with a full-time pharmacist. Also, this new superstore provides free internet service to customers once they have made a minimum purchase.
- Earlier this year, there opened a new upscale supermarket called Great Food Hall, with one outlet at the moment. It is associated with ParknShop but products on the shelf are more upscale. Located in a commercial area, it targets at a better-off clientele. Both Great Food Hall and City Super are competing in the same market segment. The opening of the Great Good Hall provides another excellent retail outlet for quality US products. When new products are proved popular in this new outlet, then they can find their way easily to ParknShop's chain stores.

- Currently ParknShop, Wellcome, and City Super are the three supermarkets offering grocery shopping over their website. The service is however not attracting a lot of interest, due to the convenience of shopping in Hong Kong, security concerns and the cost of delivery. According to a survey conducted by an independent consulting company, 43% of the adult population are internet users. Only 7% of net users are online shoppers, while books are the most popular internet purchase.
- Food products can be imported to Hong Kong duty free except cigarettes and alcoholic drinks. As for technical import requirements, the basic tenet is that no food intended for sale should be unfit for human consumption. Products which require import permits/health certificates include meat, milk and frozen confections. The Hong Kong government accepts import applications from Hong Kong importers. In other words, local importers and not U.S. exporters are required to apply for import permits. Yet U.S. exporters need to supply their agents/importers with necessary documentation such as health certificates from the U.S. government.
- In February 2001, the Hong Kong government released a consultation paper on labeling of GM foods. The consultation period ended on May 31, 2001. The government is currently reviewing the comments received during the consultation period. The consultation sets out three options: 1) a purely voluntary system; 2) a mandatory system, and 3) an initial voluntary system followed by a mandatory system. Hong Kong's labeling policy is largely patterned after the GM food labeling guidelines being formulated within Codex. Currently Hong Kong is deciding which of the three biotech food labeling options to adopt and considering the comments gathered during the consultation period. The government has not set a deadline as to when it will announce the conclusions drawn from the consultation.
- Due to limited land resources and rapid urbanization, Hong Kong has to rely heavily on imports for its food supply. In 2000, local production contributed only to 7% of fresh vegetables, 20% of live poultry, 23% of live pigs and 62% of marine fish consumed in Hong Kong.
- A recent survey showed Hong Kong's latest retail pattern during the economy downturn which Hong Kong is experiencing. Consumers tend to cook at home more often and to spend 7% less on expensive items such as seafood or fish but 10% more on cheaper vegetables and packaged foods. Sales of cheap and convenient foods such as packaged noodles, canned food, bread and biscuits, increase. There is less impulse buying.
- Hong Kong economy for the rest of 2001 and 2002 does not seem promising. It is baffled by high unemployment and weak retail demand among many other economic factors. The labor market showed signs of slackening in recent months with unemployment rate reached 5.3%. On the demand side, consumer spending remained dragged by the continued weakness in the asset markets and the worsening labor market condition. Although the domestic market may not see any significant changes in basic food items in terms of volume, price becomes consumers' top consideration at the expense of quality. As a result of such gradual change in consumption pattern, importers tend to source products which do not necessarily have the best quality, but

prices of which have to be competitive. As US products are of high quality but not price competitive, it would be a challenge for US exports to expand the market share in the coming months.

- Pattern of Purchasing fresh food

The Hong Kong government conducted a survey on the pattern of purchasing fresh food. Of 1.9 million households surveyed between October and November 2000, 87.6% usually chose to purchase fresh food from wet markets, while 12.4% usually chose to purchase fresh food from supermarkets.

Comparing households shopping in wet markets with those in supermarkets, it was found that the older the decision-makers responsible for purchasing fresh food produce in the households, the higher was the tendency of the households to go to wet markets to purchase fresh food. Some 94.7% of the households with decision-makers aged 60 and over usually chose to purchase fresh food from wet markets and the percentage decreased to 74.2% for those households with decision-makers aged below 30.

Analyzed by educational attainment, households with decision-makers having higher educational attainment had higher tendency to purchase fresh food from supermarkets as against wet markets. Some 95.2% of the households with decision-makers having primary educational attainment chose to purchase fresh food from wet markets while 85.3% for households with tertiary education decision-makers.

Regarding the outlets for purchasing the respective types of fresh food, about 90% of the households purchased fish, seafood and meat products from wet markets. For vegetables, fruits and eggs, the percentages of households which purchased these types of fresh food from wet markets were relatively lower, at 86.8%, 79.3% and 77.4% respectively.

Advantages	Challenges
World's freest economy (Heritage Foundation's 2002 Index of Economic Freedom) for the eighth year in a row. Consistent free trade and free enterprise policies. No import duty except on liquor, cigarettes, hydrocarbon oils and methyl alcohol. Separate customs territory from Mainland China. No foreign exchange controls	Severe competition between different supplying countries, aided by weaker foreign currencies.
	A very price sensitive market; importers' buying decisions depend largely on price.
H.K. dollar pegged to the U.S. dollar, so U.S. products are not subject to price fluctuations based on exchange rates.	U.S. products are disadvantaged by a higher transport cost when compared with Australian and Chinese products.
Foreign and local businesses operate on a level playing field	Lack of trader and consumer awareness of U.S. foods. Traditional preference for European foods, due to previous ties with the U.K.

Advantages	Challenges
As one of the most affluent economies in Asia, a market leader for new products.	A virtual duopoly in food retailing allows retailers to charge high slotting (shelf space) fees.
International city; residents travel frequently and are receptive to western and novel food	
Port facilities are world-class, making Hong Kong a regional trade center and entrepot.	

II. Road Map for Market Entry

A. Supermarkets

Entry Strategy

To set up a representative office in Hong Kong is one of the most effective means that U.S. companies can use to sell their products to this market, but it is very costly. Apart from this entry strategy, there are three different ways for new-to-market exporters to get into the Hong Kong market:

Through agents : U.S. exporters may consider hiring an agent. There are several factors to consider when hiring an agent. 1) Does the prospective agent already have an account with major supermarkets? Supermarkets will more readily accept new brand products when the agent already has an account with the supermarkets. 2) Does the prospective agent have a good marketing record and widespread distribution network?

The advantage of having an agent is that it can help with marketing and distribution. Some companies may secure a very competitive price package with TV/magazine/radio for advertisements. In addition, well established companies have extensive distribution networks not limited to one or two supermarkets but to very extensive distribution outlets.

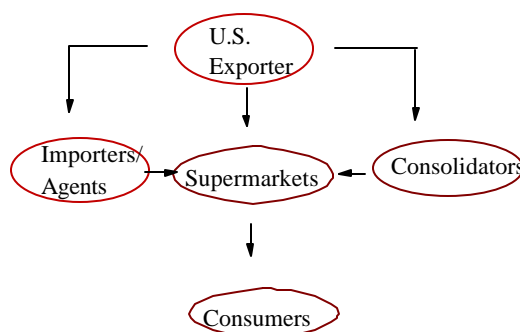
Direct to supermarkets : For branded products to sell direct to supermarkets, supermarkets usually require exclusive rights in selling the products in Hong Kong through their own outlets only. Otherwise, they will not consider any direct imports. In this case, expensive listing fees may be waived. For non-branded and large turnover products such as fruit, meat, and vegetables, supermarkets tend to buy direct from overseas exporters to cut costs.

Direct selling to supermarkets is difficult to handle because they demand strict on-time delivery and very often will not be able to take a whole

container. Logistics is the largest problem that U.S. exporters have to deal with if they want to sell direct to supermarkets. However, they can better test the market if dealing directly with retailers.

Through consolidators : Major supermarkets in Hong Kong work with U.S. consolidators for some of their products. Their purpose is to introduce new products, which have already been very popular in overseas markets, to Hong Kong.

Market Structure



- ATO Hong Kong provides lists of supermarkets and importers/wholesalers to U.S. exporters and we are happy to line up appointments if U.S. exporters come to Hong Kong exploring the market.
- For more information on food import regulations, please refer to the "Hong Kong Food and Agricultural Import Regulations and Standards, Importation of Food & Agricultural Products to Hong Kong 2001", Gain Report #HK1043.

Major Supermarket Profile

Name of Retailer	Ownership	Food Sales US\$	No. of Outlets	Location	Type of Purchasing agent
Wellcome	Hong Kong	over \$1 billion	252	Hong Kong	Importers/Agents Direct Consolidators
ParknShop	Hong Kong	over \$1 billion	200, 51 of which are superstores*	Hong Kong	Importers/Agents Direct Consolidators
China Resources Supermarket	China	not available	70	Hong Kong	Importers/Agents Direct Consolidators
Dah Chong Hong	Hong Kong	not available	41	Hong Kong	Importers/Agents
Jusco Stores (HK) Ltd.	Japan	not available	7	Hong Kong	Importers/Agents Direct Consolidators

City Super	Hong Kong	not available	2	Hong Kong	Importers/Agents Direct Consolidators
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* The definition of superstore for Hong Kong is supermarkets over 10,000 sq. ft.

- Sources show that ParknShop and Wellcome account for almost 80 percent of the supermarket turnover. Both supermarkets are able to work closely with real developers to open stores in strategic locations, thus maintaining their significant market share. Because of their significant market share, they are able to make suppliers to offer goods to them at very competitive prices, so that they are able to set retail prices lower than their competitors'. Consequently, it is difficult for small competitors to survive and new players to enter into the market.
- ParknShop's first ever superstore was introduced in 1996. In addition to an expanded fresh food and grocery selection, this retail format incorporates live seafood, sushi and sashimi departments. The superstore is a replication of the traditional wet market in a modern and hygienic environment. In the past few years, ParknShop continued to expand its "wet market" concept for fresh foods and larger format superstores. The number of superstores has increased from 30 last year to over 50 this year. Currently, the largest ParknShop superstore has a floor area of 72,000 square feet.
- For the upcoming year, ParknShop will further expand its operations in Hong Kong. It was announced that \$32 million will be invested for the opening of 12 stores, 5 of which will be superstores. Another \$26 million will be appropriated for the renovation of 13 existing supermarkets. Moreover, the existing food distribution center has been upgraded and will be open in December 2001. When this newly upgraded food distribution center operates, fresh foods from China can be distributed to all supermarkets daily before 7 o'clock. This project has cost the group \$6 million.
- Wellcome has the largest number of stores in Hong Kong. The chain handled over 13 million transactions per month. It is estimated that the annual turnover of Wellcome should amount to over US\$1 billion. Although falling behind ParknShop in the number of superstores, Wellcome appears to be following the superstore trend. It opened its largest store with a floor area of 54,000 square feet in a luxury residential complex in October 2001. While grocery and household goods constitute the bulk of the business, fresh meat and produce are becoming increasingly important. The US\$50 million Fresh Food Processing Center has facilitated fresh food supplies to all its stores. The Center can handle 2,000 different products and has a capacity for two daily deliveries to the entire Wellcome network.
- Almost all Hong Kong supermarkets require listing fees, that is, a fee charged to allow a new product to be put on their shelves. This is a one-off fee for a trial period. The listing fees are extremely negotiable and vary greatly among different supermarket chains. For example, Wellcome and ParknShop which have many branch stores have expensive listing fees. A product with five product ranges is expected to pay US\$26,000 to \$39,000. On the other hand, Jusco, a supermarket in a Japanese department store, charges \$150 for each product. The agent will not

bear cost, which is transferred to the principal.

- U.S. exporters are prepared to face trading terms such as promotional discounts (number of discount promotions offered each year); back-end income (flat rebate per year that a U.S. exporter has to pay to the retail chain based on the annual turnover); D.G.A. (Distribution allowance - the fee that the supermarkets charge for distributing the products from its warehouse to its many branch stores); incentive rebate (a percentage of turnover rebated to the supermarkets in case sales exceed the agreed amount). It can be expected that the bigger the supermarket, the harsher the trading terms. For general reference, about 15 percent of the annual turnover has to be rebated to the major supermarkets and 8 percent to small ones.
- In short, all supermarkets require listing fees except those belonging to Japanese department stores. (Jusco is the only supermarket in a Japanese department store that requires a listing fee.)
- All supermarkets except Sogo (a supermarket in a Japanese department store) have trading terms.
- In general, importers or agents have 20 percent mark-up from C.I.F. prices for food with a net profit margin of about 12 to 14 percent. The supermarket chains will mark up about 18 to 23 percent. The mark-up for different products inevitably varies. One example is that a C.I.F. Hong Kong price of a drink is HK\$9 and the retail price is HK\$17.

B. Convenience Stores

(Note: Gas marts are not included in this section because they are not significant in Hong Kong. This is a small city and there are not any real long drives.)



Entry Strategy

- Convenience stores buy goods from local importers and agents. Therefore, U.S. food exporters have to go through Hong Kong importers to have their products sold in convenience stores.
- Listing fees are also required for convenience stores.

Market Structure

U.S. Exporters

Importers/Agents

Convenience Stores

Company Profiles

Retailer Name	Ownership	No. of Outlets	Locations	Purchasing agent	Year established	Clients' age
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7-Eleven	Hong Kong	420	HK	Importers Agents	1981	15-35
Circle K	Hong Kong	141	HK	Importers Agents	1985	15-35

- Convenience stores are characterized by a round-the-clock operation. Since only limited choice of brand names is available and prices are generally less competitive, the buying pattern of their customers tends to be a "fill-in" type, whereby goods are normally bought in small quantities for immediate consumption. There are two major operators of convenience stores in Hong Kong : 7-Eleven Food Store and Circle K Convenience Store. These are ideal outlets for drinks and snacks.
- The average store size of a convenience store is 1,000 sq. ft.
- 7-Eleven is an upbeat convenience store, providing fresh food, beverages, trendy items and services around the clock. It has expanded rapidly. In 2000, there were 393 stores but the number rose to 420 in 2001. 7-Eleven has initiated innovative services, which include UPS document collection service, smart card value and photo finishing service. Other merchandising initiatives include "trendy corner" offering the hottest items in town and "fast food corner".
- Operators claimed that they face increasing competition from supermarkets because most supermarkets have long opening hours till 10:00 p.m. and some even have round the clock service.

C. Traditional Markets

Entry Strategy

- U.S. exporters who wish to capture this market segment have to make sure that their importers/agents have good distribution networks to the traditional markets through wholesalers.

Market Structure

U.S. Exporter → Importers/Agents → Wholesalers → Traditional Markets

Sub-Sector Profile

- Traditional markets include wet markets and mom-and-pop shops. They are widespread throughout the territory. There are about 15,756 wet market stalls and “mom and pop” shop operators. According to Hong Kong government statistics, traditional markets occupied consistently around 54 percent of total retail food sales several years ago. Yet the market share decreased to 46% in 1998, 1999 and 2000. The traditional market is facing ever increasing competition from the big supermarket chains which offer fresh meat, seafood and groceries. These fresh products used to be available in wet markets only and much of the business has been taken away by supermarkets once they become available in more and more of the supermarkets. Mom-and-pop shops around the housing estates and schools are ideal retail outlets for drinks and snack foods.
- According to the Hong Kong government’s town planning requirements, each district and public housing estate must include at least one wet market. Each wet market houses tens of stalls depending on the population it intends to serve. There are about 250 wet markets in Hong Kong.
- Wet markets in Hong Kong have changed gradually over the years. The newly built markets are air-conditioned and more hygienic and more environmentally pleasant than the old ones.
- Some but not all stalls in wet markets have freezers and chilling equipment which is necessary to maintain food quality.
- One feature of traditional markets is that stalls are small, but the service they offer is personal.

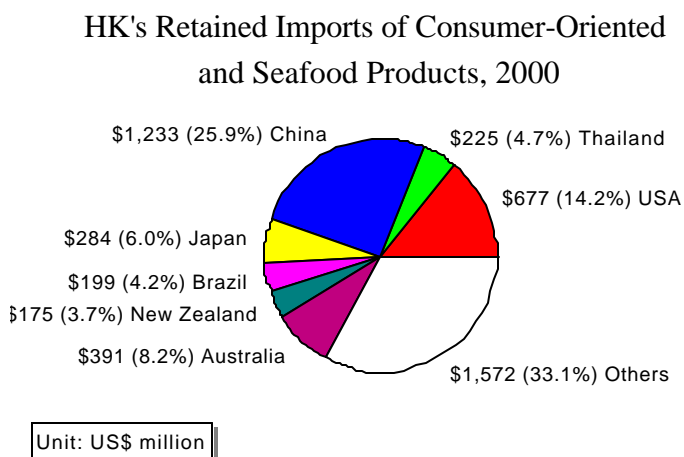
III. Competition

- Food production in Hong Kong is not significant. Food supplies rely mainly on imports. China and the U.S. are the two major suppliers, occupying a market share of 26 percent & 14 percent, respectively. In fact, the market share of U.S. style products is even higher because U.S. branded products manufactured in China are also classified as imports from China.
- Hong Kong is a free port and imports from all countries including domestic products compete on a level playing field. The key factors affecting procurement decisions are price, quality and packaging. U.S. products are highly regarded in Hong Kong because of their good quality and consumers’ confidence in U.S. food safety. China, due to its geographical vicinity, has the

advantage of lower transportation costs.

- Countries like Australia and Canada are very aggressive in promoting a wide-ranging variety of their products in Hong Kong. In addition to the efforts of their consulates to promote products, many provinces also have representative offices in Hong Kong to promote their own provinces. In-store promotion, menu promotion, trade shows and buyer missions are their usual marketing

tools. In contrast to a multi-product approach, the French have focused primarily on the promotion of wine, and Norway on salmon. In recent years, consumer-oriented products from Thailand and Taiwan have been vigorously promoted in various supermarkets. Supermarkets in Japanese department stores are



particularly keen to promote Japanese products.

Import Market Share of Major US Exports to HK versus Major Competitors

Import value of US Products in Jan - Aug 2001 USD '000	Market Share of US Products %	Major Competitor	Import Value of Major Competitor in Jan - Aug 2001 USD '000	Market Share of Major Competitor %
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poultry	273,750	52.9	China	71,184	13.8
oranges	71,989	69.7	Australia	15,017	14.5
beef	25,243	26.1	China	20,510	21.2
apples	19,599	39.1	New Zealand	11,697	23.3
fruit & veg. drink concentrate	19,105	18.3	China	41,770	40
grapes	18,219	23.4	Chile	34,874	44.7
sausages	14,890	60	China	6,623	26.7
cherries	13,024	75.4	Chile	2,020	11.7
ginseng	12,480	16	Canada	32,336	41.5
table eggs	11,875	30.1	China	19,658	49.8
almonds	11,843	79.3	China	2,544	17
soup & broth	11,321	75	Australia	2,193	14.5
potatoes, french fried	11,258	97.1	Japan	176	1.5
ice cream	9,906	61.1	UK	1,694	10.5

IV. Best Product Prospects

A. Products Present in the Market which have Good Sales Potential

Please refer to the table in Section III.

B. Products Not Present in Significant Quantities but Which have Good Sales Potential

Description	Import Value of US Products in Jan - Aug 2001 USD'000	% change	Market Share %
frozen oysters	959	188.9	22.8
fresh/chilled potatoes	3,102	132.8	63.9
potatoes, french fried	11,258	89	97.1
liqueur	2,859	78.5	2
frozen scallops	2,804	57.6	21.5
mixes & doughs	1,353	46.8	35.6
cherries	13,024	42.1	75.4
tomato ketchup	2,594	34.3	39.7
vegetables soup	3,154	26.7	61
apples	19,599	21.6	39.1
sweet corn, prep/pre	5,373	21	88.6
ice cream	9,906	15.9	61.1
cereals	4,865	14.2	35.9
fresh oysters	983	12.9	35.4

hazelnuts	6,497	11.4	88.1
chocolate products	4,244	10.9	11.5
peaches, nectarines	2,333	10	30
cheese	2,609	8.7	11.8
fruit & veg. juices	6,228	7.6	40.2
soup & broth	11,321	7.2	75

- Hong Kong has a very small market for organic products, but the market is growing.

C. Products Not Present Because They Face Significant Barriers

There are no trade barriers for the Hong Kong market.

V. Post Contact and Further Information

Foreign Agricultural Service (FAS) Home Page: http://www.fas.usda.gov	
Hong Kong Contacts	
Agricultural Trade Office of the American Consulate General - Hong Kong 18 A, 33 Garden Road, Central, Hong Kong Tel: (852) 2841-2350 Fax: (852) 2845-0943 E-mail: ATOHongKong@fas.usda.gov Home Page: http://www.USfoods-hongkong.net	
OR http://www.usconsulate.org.hk/ato	
(Food safety control policy) Food & Environmental Hygiene Department Food and Public Health Branch 43 rd floor, Queensway government offices 66 Queensway Hong Kong Tel: (852) 2867-5511 Fax: (852) 2893-3547 E-mail: enquiries@fehd.gov.hk Home Page: http://www.fehd.gov.hk	(Importation of plants & live animals) Agriculture, Fisheries and Conservation Department 5 th to 8 th floors, Cheung Sha Wan Government Offices 303 Cheung Sha Wan Road Kowloon Hong Kong Tel: (852) 2708-8885 Fax: (852) 2311-3731 E-Mail: afcdenq@afcd.gcn.gov.hk Home Page: http://www.info.gov.hk/afcd
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<p>(Hong Kong companies registration) Companies Registry 12th-15th, 17th and 29th floors, Queensway Government Offices, 66 Queensway, Hong Kong Tel: (852) 2234-9933 Fax: (852) 2869-6817 E-mail: crenq@cr.gcn.gov.hk Home Page: http://www.info.gov.hk/cr</p>	<p>(Trade Promotion and Hong Kong Information) Hong Kong Trade Development Council 38th Floor, Office Tower, Convention Plaza, 1 Harbor Road, Wan Chai, Hong Kong Tel: (852) 2584-4188 Fax: (852) 2824-0249 E-mail: hktdc@tdc.org.hk Home Page: http://www.tdctrade.com</p>
<p>(Hong Kong Travel Information) Hong Kong Tourist Association 9th - 11th floors, Citicorp Center, 18 Whitfield Road, North Point, Hong Kong Tel: (852) 2807-6543 Fax: (852) 2806-0303 E-mail: info@hkta.org Home Page: www.hkta.org</p>	